

APPENDIX A

DESIGNATED EMPLOYEE POSITIONS¹

(Amended by the Board of Governors on January 7, 2011)
Legislative style with Deletions in ~~strike-out~~ and Additions in blue

I. Office of the Executive Director

Office and Positions	Disclosure Categories
Executive Director & Secretary	1
Deputy Executive Director	1
Manager Planning and administration	4, 11, 12
Senior Administrative Specialist JNE & Appointments	4, 11, 12
Senior Administrative Specialist	20
Director Office of Legal Services	2, 4, 6, 10, 11, 14, 17, 18
Program Coordinator	2, 4, 10, 11, 18
Program Developer	2, 4, 10, 11, 14, 17, 18
Senior Administrative Assistant	2, 4, 10, 11, 14, 17, 18
Managing Dir Legal Services Trust Fund	2, 4, 6, 10, 11, 14, 18
Senior Grants Administrator	20
Senior Administrative Assistant	20
Director of Media Services & Information	2, 7, 14, 18, 19
Web Editor	2, 7, 19
Editor / General Manager Cal Bar Journal	2, 14, 19
Publication & Production Assistant	20
Public Information Officer	20
Managing Director Bar Relations Outreach	2, 4, 10, 11, 14, 17, 18, 19
Program/Court Systems Analyst	2, 4, 10, 11, 14, 17, 18, 19
Director Professional Competence	2, 4, 7, 9, 10, 11, 14, 17
Senior Administrative Specialist	2, 4, 7, 9, 10, 11, 14, 17
Attorney, Professional Competence	20
Manager Human Resources	5, 7, 8
Senior Human Resources Analyst	5, 7, 8

¹ Where employees in both San Francisco and Los Angeles have the same job title, only the job title appears and not the location. Employees in either location with the indicated job title should file conflicts reports according to the category listed.

Office and Positions	Disclosure Categories
Human Resources Employment Representative	8
Human Resources Representative	20
Managing Director Diversity Outreach	2, 4,10, 11, 14, 17, 18
Senior Administrative Assistant	2, 4,10, 11, 14, 17, 18

II. Operations

Office and Positions	Disclosure Categories
Director Operations	1
Deputy Director Operations - LA	2, 4, 5, 6, 10,11,13,14,15,18
Supervisor Office & Reception Services	2, 4, 10, 11, 14, 18
Administrative Specialist	2, 4, 10, 11, 13
Deputy Director Operations - SF	2, 4, 5, 6, 0,11,13,14,15,18
Supervisor Office & Reception Services	2, 4, 10, 11, 14, 18
Supervisor Offset Printing	2, 10, 14
Senior Librarian / Archivist	10, 17

III. Office of Chief Trial Counsel

Office and Positions	Disclosure Categories
Chief Trial Counsel	1
Special Assistant to Chief Trial Counsel	20
[inserted text begins] Consultant to Chief Trial Counsel [inserted text ends]	[inserted text begins]1[inserted text ends]
Deputy Chief Trial Counsel	20
Assistant Chief Trial Counsel	20
Dir Central Administration	7, 10
Manager Central Administration	20

IV. State Bar Court

Office and Positions	Disclosure Categories
State Bar Court Judge	20
Administrative Officer	1
Director Client Security Fund	20
Senior Administrative Supervisor	20
Director Fee Arbitration	4

Office and Positions	Disclosure Categories
Senior Administrative Assistant	20
Chief Court Counsel	20
Chief Assistant Court Counsel	20
Court Administrator	20
Court Services Analyst Technician	20
Administrative Specialist II	20
Senior Attorney, Probation	20

V. Admissions

Office and Positions	Disclosure Categories
Senior Executive Admissions	1
Sr. Administrative Assistant	2, 3, 4, 7, 9, 10, 11, 13
Administrative Specialist	20
Director for Educational Standards	2, 3, 4, 7, 10, 11, 13, 14, 17, 18
Sr. Administrative Assistant	4, 11, 17
Director for Examinations	2, 3, 4, 7, 10, 11, 13, 14, 17, 18
Examination Technician	2, 4, 7, 10, 11, 18
Director for Legal Specialization	2, 3, 4, 7, 10, 11, 13, 14, 17, 18, 19
Senior Administrative Assistant	4, 11
Section Chief, Legal Specialization	2, 4, 7, 8, 9, 10, 11, 13, 14
Director for Administration	2, 3, 4, 7, 8, 9, 10, 11, 13, 14, 18
Section Chief, Administration	2, 4, 7, 10, 14
Section Chief, Examinations Grading	2, 4, 7, 10, 14
Director for Moral Character Determinations	2, 3, 4, 7, 10, 11, 16, 18
Section Chief, Moral Character Determinations	20
Director Operations & Management – LA	2, 4, 6, 7, 10, 11, 13, 14
Deputy Director Operations & Management	2, 4, 6, 7, 10, 11, 13, 14
Section Chief, Examination Administration	2, 4, 7, 8, 9, 10, 11, 13, 14
Section Chief, Application Preprocessing	20
Section Chief, Eligibility	20
Section Chief, Applicant Services	20

VI. Office of Member Services

Office and Positions	Disclosure Categories
Senior Executive, Member Services	1
Director Lawyer Assistance Program	2, 4, 7, 10, 16, 17, 18, 19
Special Assistant to the Director of LAP	2, 4, 7, 10, 16, 17, 18, 19
Clinical Director	2, 4, 7, 10, 16, 17, 18, 19
Director Administration, Member Services	2, 4, 5, 6, 7, 10, 11, 14, 17
Senior Administrative Assistant	4, 5
[deleted text begin]Senior Administrative Assistant[deleted text end]	[deleted text begin] 4, 5 [deleted text end]
Senior Administrative Supervisor	2, 4, 5, 6, 7, 10, 11, 14, 17
Senior Administrative Supervisor	20
Director Section Education & Meeting Services	2, 4, 10, 11, 17, 18
Manager Section Education & Meeting Services	2, 4, 10, 11, 17, 18
Meeting & Event Administrator	2, 4, 10, 11, 17, 18
Section Coordinator	2, 4, 10, 11, 17, 18
Senior Administrative Assistant	2, 4, 11, 14

VII. Office of General Counsel

Office and Positions	Disclosure Categories
General Counsel	1
Chief Assistant General Counsel	20
Assistant General Counsel	20
Managing Director of Administration	9, 10
Attorney III (Confidential)	20

VIII. Office of Administration & Finance

Office and Positions	Disclosure Categories
Senior Executive for Finance / CFO	1
[inserted text begins]Dir., Budget & Performance Analysis [inserted text ends]	[inserted text begins]1[inserted text ends]

Office and Positions	Disclosure Categories
[inserted text begins] Budget & Performance Analyst [inserted text ends]	[inserted text begins]10[inserted text ends]
Manager Finance	1
Supervisor of Accounting	6
Senior Financial Analyst	6

IX. Office of Information Technology

Office and Positions	Disclosure Categories
Senior Executive for Information Technology	1
Director Technology Systems – LA	7, 10
Director Information Systems – SF	7, 10
Manager Systems Development	7, 10
Manager Telecommunications	7, 10
Manager Information Technology/Systems Projects	7, 10
Technical Support Administrator	20

X. Miscellaneous Boards & Commissions

Office and Positions	Disclosure Categories
Committee on Group Insurance	20
Committee on Professional Liability Insurance	20
Lawyer Assistance Program Oversight Committee	20
Board of Legal Specialization	20
Advisory Commission, Legal Specialization	20
Committee of Bar Examiners	20
Client Security Fund Commission	20
Legal Services Trust Fund Commission	20
Consultants/Contractors	30

APPENDIX B

DISCLOSURE CATEGORIES

(Amended by the Board of Governors on January 9, 2010)

Category 1. Designated Employees in this category shall disclose, as required by Government Code sections 87206 and 87207 and this Code sections 6 and 7, all reportable investments, business positions in business entities, interests in real property, and sources of income.

Designated Employees in this category shall disclose, as required by Government Code sections 87206 and 87207 and the State Bar's Conflict of Interest Code, all reportable investments in, business positions held in, and sources of income received from the following business entities or individuals:

Category 2. Vendors of typesetting, printing or duplicating services or equipment, and vendors of messenger services.

Category 3. Accredited and unaccredited law schools, admissions related consultants.

Category 4. Vendors of meeting space, food services, and entertainment.

Category 5. Insurance companies, insurance brokerage firms, carriers, holding companies, underwriters, brokers, solicitors, agents, adjusters, claims managers, actuaries, and third-party administrators.

Category 6. Banks and other financial institutions.

Category 7. Vendors of computers, computer hardware, computer maintenance, software, data processing, web hosting, web design, and computer consulting services.

Category 8. Employee benefit providers and administrators of employee benefits, personnel consulting services and employment agencies.

Category 9. Court reporting services.

Category 10. Vendors of office supplies, office equipment, office furniture or building maintenance supplies or services, video or telecom supplies, services, or equipment, and moving and storage services.

Category 11. Travel agencies, hotels, meeting planning services, airlines, car rental agencies and ground transport.

Category 12. Providers of voting and election related services.

- Category 13. Security services.
- Category 14. Mass mailing services.
- Category 15. Real estate brokerage firms, real estate agents, real estate brokers and companies that engage in property management, land development, construction or the acquisition or sale or leasing or subleasing of real property.
- Category 16. Providers of treatment or services related to chemical dependency.
- Category 17. Providers of continuing legal education, legal publications, online legal research.
- Category 18. Providers of audio-visual production services.
- Category 19. Public relations and / or media management consultants.
- Category 20. Designated Employees in this category shall only be required to disclose financial interests on their Statement of Economic Interests under the following circumstances: If during a reporting period, a Designated Employee in this category has been required to make a disclosure under the provisions of Business and Professions Code section 6036, he or she shall disclose the disqualifying interest on a Statement of Economic Interests.
- Category 30. The disclosure category for Designated Employees in this category shall be determined by the Executive Director in consultation with the Board of Governors.